

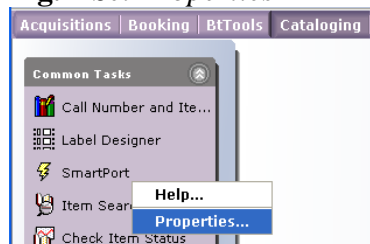
WYLD TECHNOTE: SmartPort Property Settings

In order to import bibliographic records from OCLC or LC, the SmartPort settings need to be entered on each computer terminal where record importing will take place. These settings are retained so you do not have to set them each time you use SmartPort as long as you save the settings when you logout of Workflows.

1. To set SmartPort properties:

Select the Cataloging toolbar. Right click on the SmartPort wizard to access the properties for that wizard.

Fig. 1 *Set Properties*



Default Settings

Fig. 2 *Match and Load for Libraries using Dewey Classification*

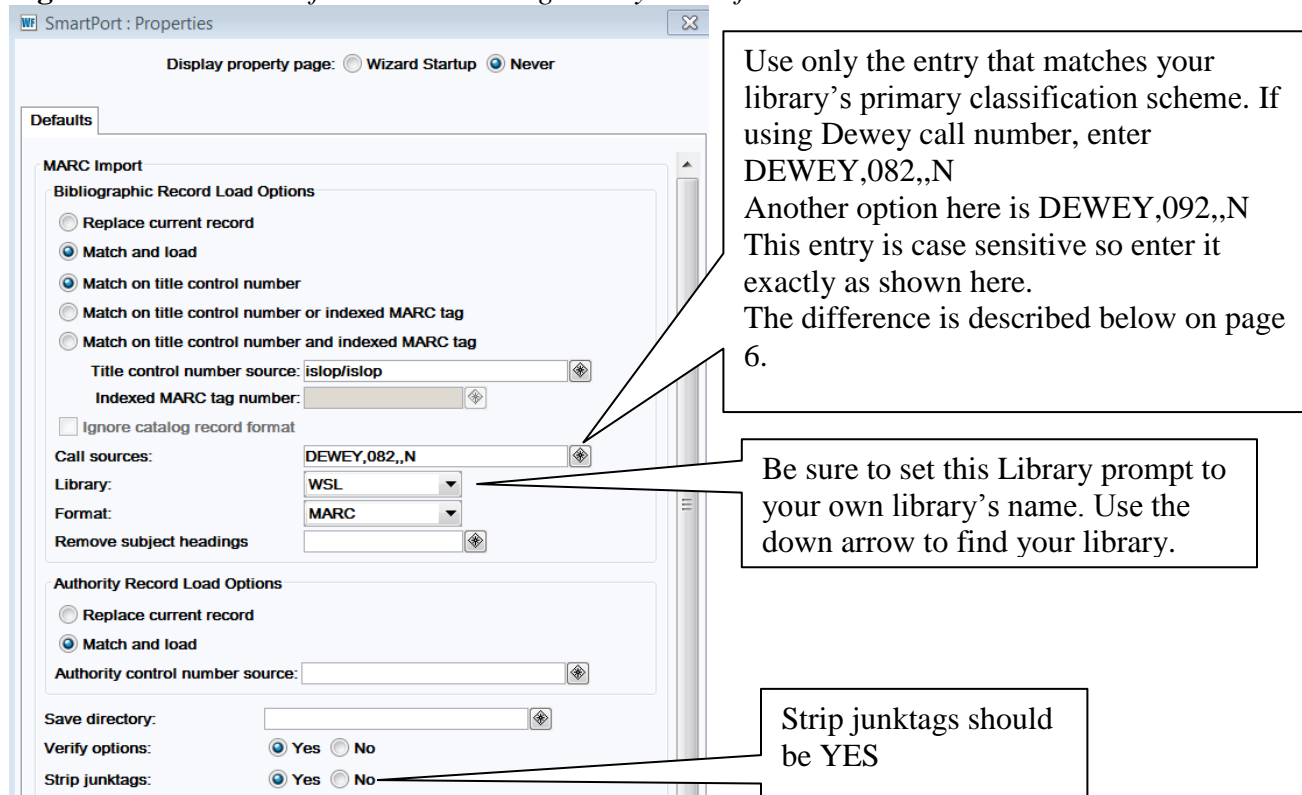
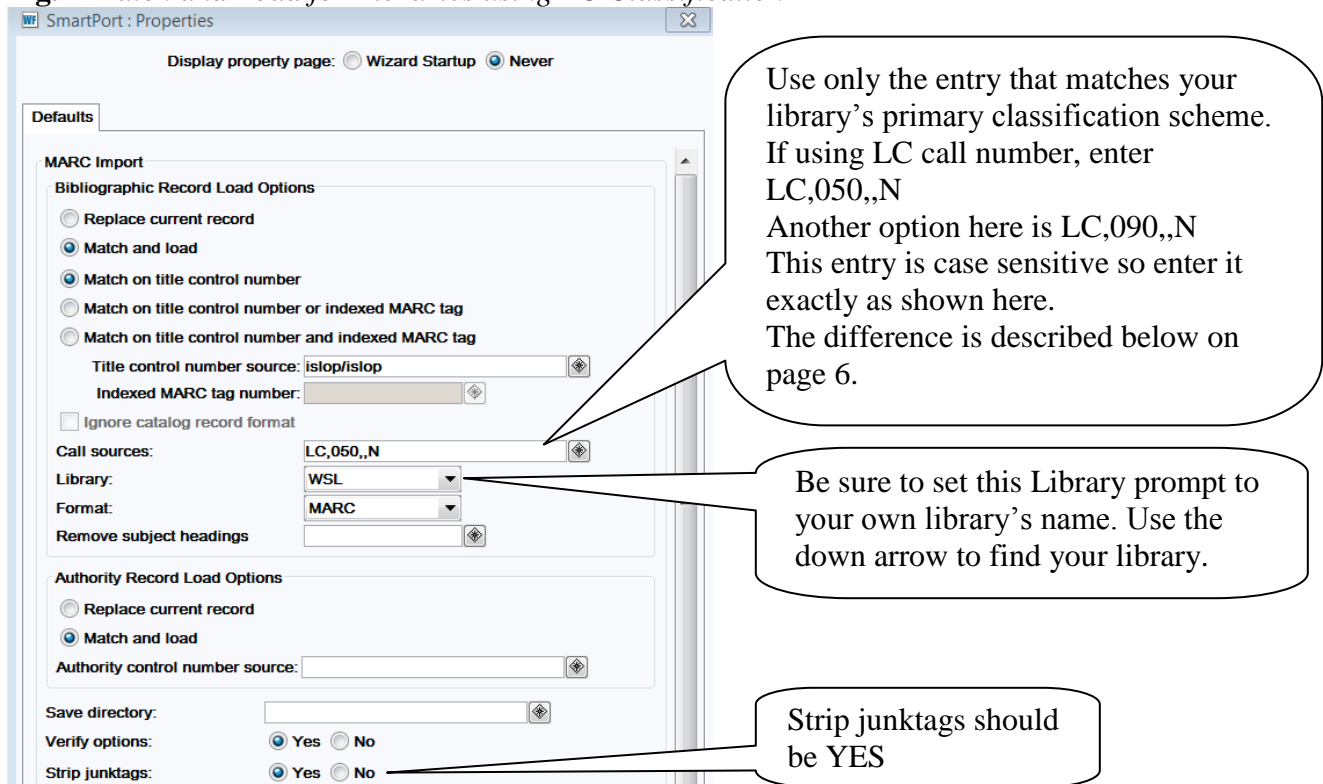


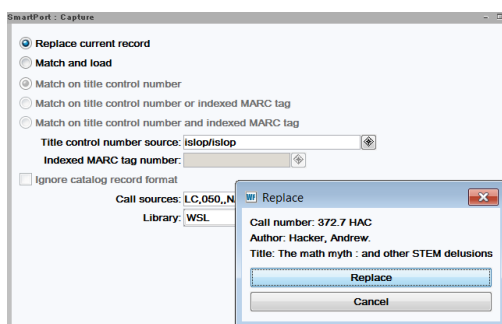
Fig. 2 Match and Load for Libraries using LC Classification



Following pages provide explanation of the meaning of selections shown in the window above.

2. Bibliographic Record Load Options:

“Replace Current Record” is the option that enables you to overlay a record in WYLD. This means that you would be replacing the last bibliographic record you modified in WYLD with the record currently being viewed within SmartPort. This is useful for replacing bibliographic records that provide inadequate or incorrect access, such as on order records. ***Be sure to confirm that the record that will be overlaid is the record you want to overlay. If it isn't then halt the overlay process when the title confirmation window appears.



Click the Close button to get back to the record search window in SmartPort. You don't have to log out of SmartPort.

"Match and Load" is the default option that should be checked. This option is based on the values in the Title Control Number Source, Call Sources, and Library. If the system finds a matching record, a window displays indicating what kind of match was used and the matching number. For example:

Matching record found on title control # i9781101982679

The above message can result in the new record being imported into WYLD and automatically overlaying the existing WYLD record. Open another wizard tab to check this Title Control Number in WYLD before proceeding with the overlay to be sure it really is an operation you want to continue.

For record matching based on a Title Control Number only, click on the 2nd option as shown in the Fig 2 examples above that is labeled "Match on title control number".

"Match on title control number OR indexed MARC tag" is the next option. The record is considered a match if the title control number of the bibliographic record matches one of the specific Title Control Number Source Fields in the imported record, OR if one of the standard matching numbers from the incoming record finds a match in the WYLD database indexes. These matching numbers are listed in the Indexed MARC Tag Number Field and are described below in step 4.

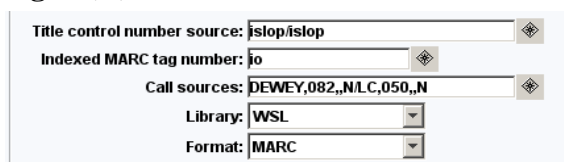
"Match on title control number AND indexed MARC tag" is the last option. The record is considered a match if the title control number of the bibliographic record matches one of the specific Title Control Number Source Fields in the imported record, AND if one of the standard matching numbers from the incoming record finds a match in the WYLD database indexes. The incoming record has to match both the title control number AND the specified indexed tag(s). The matching numbers are listed in the Indexed MARC Tag Number Field and are described below in step 4.

3. Title Control Number Source: islop

These are the match points which you specify from entries in the bibliographic record that will be checked against the incoming record. The *i* of *islop* represents the ISBN; *s* is for the ISSN for serials; *l* represents the LC number; *o* is for the OCLC number when it appears in an 001 tag on the bib record; *p* represents the OCLC number when it appears in an 035 tag on the bibliographic record. These letters are entered in lower case and can be pulled into the datawell by the system when you use the gadget to access the list of options for this title control number source.

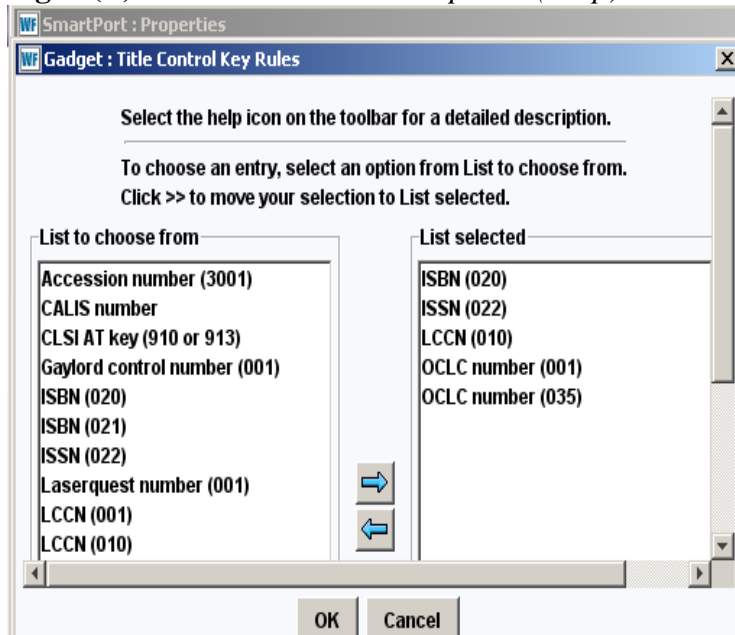
Click on the gadget next to the entry to create the options for that entry as illustrated by the arrow in Fig. 3A below.

Fig. 3 (A) Title Control Number Source



Title control number source: islop/islop
Indexed MARC tag number: jo
Call sources: DEWEY,082,,N/LC,050,,N
Library: WSL
Format: MARC

Fig. 3 (B) Title Control Number Options (*islop*)



Select options from the column on the left and use the arrows in the middle to move those options to the list on the right. After selecting the options shown, in the order shown, click **OK**.

By selecting these options in the gadget, you have created the abbreviation *islop* (in lowercase) in the datawell for the Title Control Number Source. The system checks the bibliographic database for a title control match on the first Title Control Number Source value. If no match is found, the second Title Control Number Source is checked, and so on, until all values have been checked.

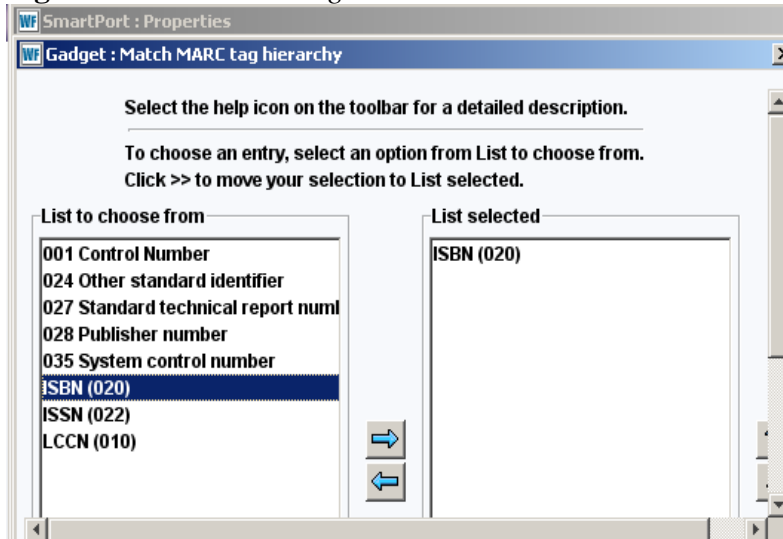
The Title Control Number Source determines whether the title control number of the existing record is replaced or retained. If an existing WYLD record has a title control number that is not comprised of one of these values, it should be replaced with a title control number that is one of these source values so that duplicates are not created in WYLD if the same record is brought into the system again. For example: The existing WYLD record has the title control number AFS-0704. You would want the system to replace this number with one of the Title Control Number Source options. If the incoming record from OCLC has only an LC number, you would want to be sure the system uses that to replace the AFS-0704 so that the new title control number would be l49009981.

In order to make the system replace the old title control number, you need to repeat the *islop* entry in the Title Control Number Source and separate the second entry from the first one with a slash. The Title Control Number Source should appear as: *islop/islop*. The system will not automatically create the slash or the second entry of *islop*.

****Note:** A Title Control Number will have as its first element the lower case letter of the Title Control Number Source *islop* depending on which value is used to create the title control number, e.g., i9780385159005 for an ISBN title control number.

4.Indexed MARC Tag Number:

Fig. 4 *Indexed MARC Tag Number*



Select the ISBN as the first MARC tag option for additional match elements. Other options may be selected such as the 024 which is a tag found in AV materials. Highlight an option on the left and use the arrow in the middle to move that selection to the column on the right.

In the example above in *Fig. 3A*, the indexed MARC tags are io (i for ISBN, o for OCLC number). With this option, the match for an incoming record has to match the title control number OR the ISBN in the 020 tag or the OCLC in the 001 tag of the bibliographic record.

5.Call Sources: LC,090,,N or DEWEY,092,,N LC,050,,N or DEWEY,082,,N

Use the gadget next to the Call Sources datawell to specify the source of call number information you wish to use for your library. (see Fig. 3A)

Fig. 5 (A) Call Source for LC

SmartPort : Properties
Gadget : Call Number Load Rules

Select the help icon on the toolbar for a detailed description.
Create a hierarchy of Call Number load rules.
Fill the values that make up a rule and select Add.
The order of rules is important.

Classification: LC
Entry ID: 000
Subfields: 047
Occurrences: 049

Classification »	Entry ID	Occurrences
LC	050	051
	052	055
	058	

Add OK Update (b) Remove Cancel

Fig. 5 (B) Call Source for Dewey

SmartPort : Properties
Gadget : Call Number Load Rules

Select the help icon on the toolbar for a detailed description.
Create a hierarchy of Call Number load rules.
Fill the values that make up a rule and select Add.
The order of rules is important.

Classification: DEWEY
Entry ID: 000
Subfields: 070
Occurrences: 071

Classification »	Entry ID	Occurrences
DEWEY	082	072
	073	074
	080	082
	084	

Add OK Update (b) Remove Cancel

a) Use the down arrow next to the *Classification* datawell to select the type of call number for your library: **LC** or **DEWEY**. Your library may use other types of call numbers as well but this sets the default for the classification that comprises the bulk of your library's collection. Other possible options could be **SUDOC** (Federal Documents), **WYDOCS** (Wyoming State Documents), or **NLM** (National Library of Medicine). **AUTO** may also be used if you don't wish to specify a classification, but will result in the creation of a default XX call number which will need to be changed.

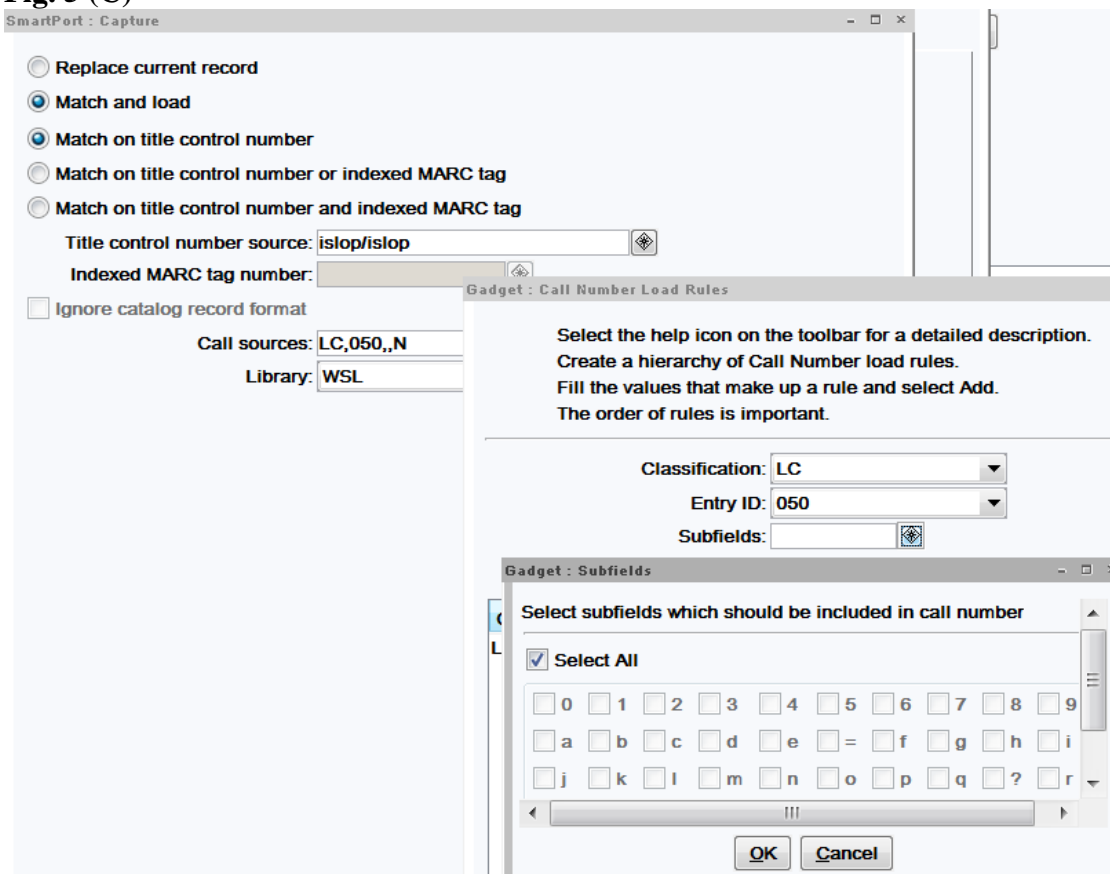
b) Use the down arrow next to the *Entry ID* datawell to select the tag from the bibliographic record that contains the type of call number your library uses. For LC libraries, select Entry ID **090** or **050**; for Dewey libraries, select Entry ID **092** or **082**. If using one of the other three most common classifications, select Entry ID **086** for both SUDOC and WYDOCS, and select Entry ID **060** for the National Library of Medicine call numbers. If you select Auto as your default classification, select Entry ID **000**.

****Note:** Using the local call number tags (090 for LC and 092 for Dewey) will likely result in the creation of an XX auto-generated call number as those tags aren't always in the bibliographic record. This requires that you change these xx call numbers to your library's real call number information. However by allowing the system to auto-generate the call number, you will be less likely to get the message that "Call Number is already used."

****Note 2:** If the call number source is left as LC,050,,N or DEWEY, 082,,N and you get a message when capturing a record that Call number already exists, simply edit the Call Source in the Capture window. If the default is DEWEY,082,,N, change it temporarily to DEWEY 092,,N. This should permit you to bring this specific record into WYLD with either a call number in an 092 tag if there is one on the incoming bibliographic record, or an XX call number will be created that can be changed to the Dewey call number that is desired. (see Fig. 3A)

After the Call Source has been selected, the desired subfields can be selected as shown here. In this example, all of the subfields have been chosen.

Fig. 5 (C)

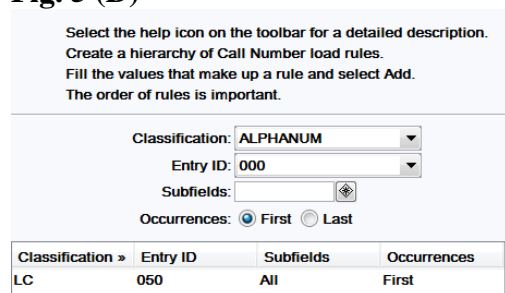


c) For *Subfields*, use the gadget next to that option to confirm that **Select All** is the default setting as shown above.

Click **OK**.

d) For *Occurrences*, select **First** as shown here.

Fig. 5 (D)



Once these four options (a-d) have been selected, click the **Add** button to add those selections to the table directly above the buttons. (*see Fig. 5A*). If more than one set of Call Number Source options is desired, repeat steps *a-d* and click the Add button to add the second choice to the table. When finished click **OK**.

The two Call Number Sources illustrated below: **LC,090,,N/LC,050,,N** are created as the result of adding both of these selections to the table of the Call Number Source option. The system creates them in upper case values. The system looks for a call number in the incoming record based on the type of call number you've specified here. In the illustrations provided here, the system looks for an LC call number in the 090 tag. It will include all subfields for the call number and it will look at only the first occurrence of that 090 tag. The second part of the illustration tells the system to continue looking for a different tag for a call number if an 090 tag isn't present in the bibliographic record. Therefore, if there is no 090 tag, the system will look for an LC call number in an 050 tag. It will include all subfields for that call number and it will look at only the first occurrence of an 050 tag. **The Dewey equivalent is: **DEWEY,092,,N/DEWEY,082,,N**

6.Library: Enter your short code to define your library, e.g., WSL.

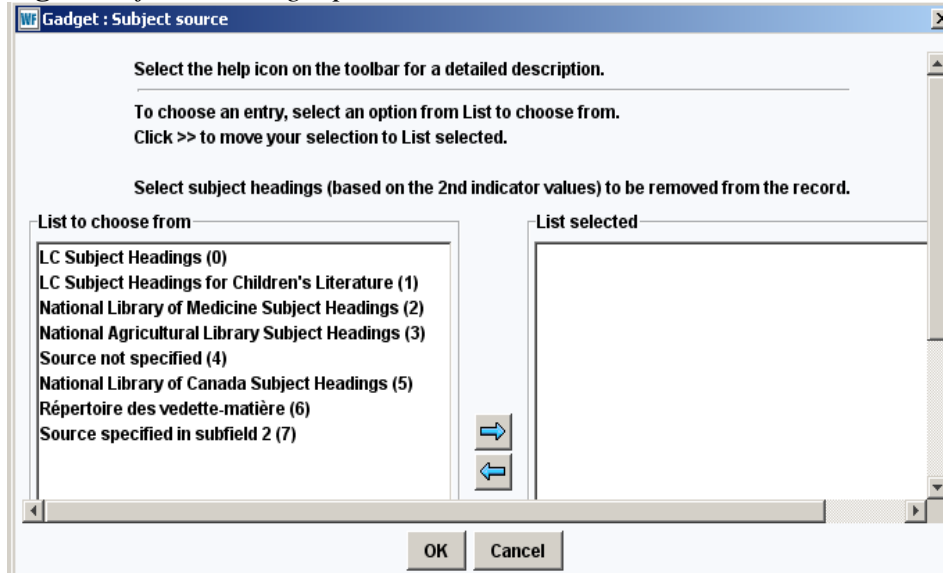
Fig. 6 Library

7.Format: MARC (In Workflows, this is the default format for print materials only)

Fig. 7 Format

8. Remove Subject Headings:

Fig. 8 *Subject Heading Options*



A number of foreign language headings come into the system coded as the last option displayed above: Source specified in subfield 2 (7). This notation means those tags formatted like genre headings that have a subfield 2 with an indicator of 7. With this setting as it currently is constructed, there is no way to distinguish genre headings which are desirable in WYLD from Dutch headings or Sears headings.

9. Authority Record Load Option:

The defaults in this portion of the SmartPort settings do not need to be changed. We do not load authority records in this manner.

Fig. 9 *Authority Record Load Options*

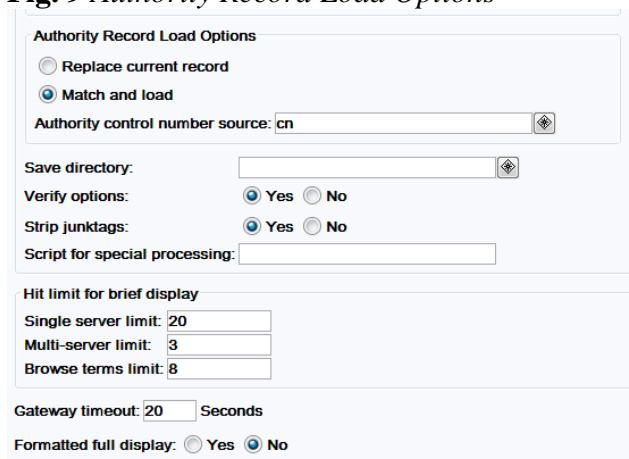


Fig. 9 (A) *Strip Junktags* This is shown above. The option for Strip junktags should be YES. The WYLD Office has selected the tags that will be stripped and include 29 and 952.

10.Hit Limit for Brief Display:

Scroll past the Authority Record Load option to the last portion of the SmartPort settings.

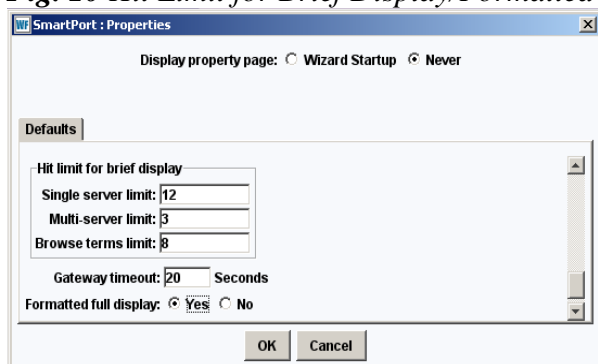
Single Server Limit can be increased to as high as 45. This sets the number of brief records to display in the Search Results hitlist for a single server search, i.e., OCLC is a single server, LC is another single server.

Multiple Server Limit is set at 3 as the default so only three brief records will display in the Search Results hitlist if multiple servers are searched at once. For example if you were searching OCLC and LC at the same time, you'd see only 3 entries on the brief record hitlist for OCLC and 3 entries on the brief record hitlist for LC. This limit can be set as high as 45 if searching two servers at a time.

Browse Terms Limit is set at 8 as the default for the number of browse terms to display but can be increased to 10. The Browse search option works only in OCLC.

****Note:** Setting large numbers for the brief record display hitlist may impact retrieval time from the selected servers.

Fig. 10 Hit Limit for Brief Display/Formatted Display Options



Gateway Timeout default is 20 seconds. This is the length of time the SmartPort wizard allows for the process of connecting to a server before it times out if no connection can be made.

****Note:** This should not be set to zero as that would result in the inability to connect to any server at all.

Formatted Full Display sets the default of how a record retrieved will display in SmartPort. **Yes** for a formatted display results in a display with descriptive labels instead of tag numbers. **No** for an unformatted record display means the record will display with MARC tag numbers and no descriptive labels. (Note that after a record has been retrieved in SmartPort, it is possible to change the Format Display setting on a record by record basis by clicking in the box next to that *Format* display option in the upper left of the bib record display window.)

Click the **OK** button when all desired SmartPort property settings have been made.